

IN THE CIRCUIT COURT OF THE FIFTEENTH JUDICIAL CIRCUIT  
IN AND FOR PALM BEACH COUNTY, FLORIDA

IN RE: GUARDIANSHIP OF

DIVISION: IX

HELEN M. O'GRADY.

CASE NO. 502012GA000016XXXXSB

**PETITION FOR ORDER AUTHORIZING PAYMENT OF  
COMPENSATION AND EXPENSES OF GUARDIAN**

1. Petitioner, ELIZABETH SAVITT, was appointed by the court as the emergency temporary guardian of the person and property of HELEN O'GRADY (the Ward) on January 11, 2012 and appointed as the permanent plenary guardian of the person and property on April 2, 2012.

2. The total amounts of all prior fees paid or costs awarded to petitioner in this proceeding are:

Fees: \$-0-

Costs: \$-0-

3. Petitioner has rendered services as guardian of the Ward and incurred expenses from January 11, 2012 through May 14, 2012 as more fully described and set forth in the itemized schedule of services and expenses attached hereto as Exhibit A, for which petitioner has not been paid.

4. Based upon the criteria established by Section 744.108(2), Florida Guardianship Law, petitioner is of the opinion that reasonable compensation for the services performed by petitioner during that time period is:

Fees: \$6,435.00

Less: \$1,000.00CR for Retainer

Costs: \$ 24.89

**Total: \$5,459.89**

Petitioner requests that an order be entered awarding petitioner reasonable compensation for the services rendered and expenses incurred by the petitioner for the benefit of the Ward and the Ward's estate, and authorizing and directing that such compensation and expenses be paid from the assets of the Ward's estate.

Under penalties of perjury, I declare that I have read the foregoing, and the facts alleged are true, to the best of my knowledge and belief.

Signed on this 18<sup>th</sup> day of May, 2012.

By: Elizabeth Savitt  
Elizabeth Savitt, Petitioner and Guardian

SHERI L. HAZELTINE & ASSOCIATES, P.A.

By: Sheri L. Hazeltine  
Sheri L. Hazeltine, Esq.  
Attorney for Elizabeth Savitt, Guardian  
Florida Bar No. 0674567  
800 Palm Trail, Suite 3  
Delray Beach, Florida 33483  
(561) 243-4655 (office)  
(561) 243-6933 (fax)

#### CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a true copy of this Petition for Order Authorizing Payment of Compensation and Expenses of Guardian was mailed via first class mail service through the U.S. Postal Service on this 18<sup>th</sup> day of May, 2012 to: Clifford Hark, Esq., 3301 N.W. Boca Raton Blvd., Suite 200, Boca Raton, Florida 33431; Larry Miller, Esq., 2101 N.W. Corporate Blvd., Suite 400, Boca Raton, Florida 33431; and Joseph Lee, Esq., 1005 Lake Avenue, Lake Worth, Florida 33460.

By: Sheri L. Hazeltine  
Sheri L. Hazeltine, Esq.  
Florida Bar No. 0674567

Betsy Savitt  
Emergency Temporary Guardian for Helen O'Grady  
Billing Period from 1/11/12 to 3/27/12

Date	Description	Hour	
1/11/12	T.C. Cliff Hark, asked me to come to office to meet with Tom Mayes concerning ETG.	1.4	
1/12/12	T.C. Sheri Hazeltine, notify of case, discuss issues. Travel to meet Mrs. O'Grady at Emeretus, met nursing staff waiting for her to return from Doctor. Went over her med list with nurse. Met with director about her conditions. T.C. Tom about how to get bank account set up. Both names on paperwork so bank will not set up guardianship account. Travel to Hazeltine, give documents of ETG. Go over problem with presenter. Contact Cliff Hark and Tom for clarification of problem with the ETG orders. T.C. Tom, What Helen needs and does not need. Discuss health and problems with family members. Mothers wishes conflicting with her needs.	2.5  0.4  0.8	
1/13/12	T.C. Helen - status check	n/c	
1/17/12	Travel to Sheri Hazeltines office to sign oath, take paperwork. T.C. Tom, go over Doctors orders. Copy of certified letters T.C. Helen - status check	1.0 0.2 n/c	
1/18/12	T.C Cliff, going over ETG, wants to get going with Doctors appointments, e-mail with 10 court orders.	0.5	
1/19/12	T.C. Helen, notify of Cardiologist appointment. Does not remember me from last week. She does want to see a Dr. for second opinion. Make arrangements to pick up. States she wants to look into fixing her home so she can return. Vanity, upgrades. She is having a family event dinner at 4:00 she is looking forward to in lobby. T.C. Dan Mayes. Talked about stolen money, jewelry, older brother, did not know his Mother had so much money. Wants to send a fax with documents of all the family money problems. Told him I was only guardian of her person. E-mail Tom the medical appointment. T.C. Stephen Krasner for consult.	0.4  0.4 0.2 0.4	
1/20/12	Meeting at Cliff Hark office with Amy Beller, Tom, Dan, Sandy, Helen. Went to Helen O'Grady's house for inspection. Write in notes and file, e-mail recaps from Hazeltine, Met Mrs. O'Grady at Cardiologist, Steve Krasner. Went over symptoms, chest pain, shortness of breath, critical aortic stenosis. She may be masking symptoms by being sedentary. She was confused as to why we were there, thought it was for her leg. Stated she did not want operation now, would rather wait.	2.5  0.5  2.0	
1/21/12	T.C. Helen O'Grady, needs money, can I find some for her. E-mail, Tom, re: all of her Doctor's reports	0.2 1.0	
1/23/12	Read physician report for Helen, send fax to Doctors re: ETG Meeting with C. Hark and S. Hazeltine T.C. Tom, Discuss medical history, possibly lying about symptoms. Dr. Visit and read e-mails from att's.	0.6 0.5 0.5	
1/24/12	T.C. Tom T.C. Dan, Helen can live with me. He needs fix up money for the house.	0.3 0.3 0.2	

Exhibit A

	E-mails re: frozen accounts		
1/25/12	T. C. Helen Visit to Helen, met Ron and Daughter at Emeritus visiting with Helen for her B'day.	0.2 1.0	
1/26/12	Send examining committee e-mail re: Doctors reports. Read e-mails on Helen's health history from Sisters T.C. Tom	0.5  n/c 0.2	
1/27/12	E-mail Tom and Hazeltine Re: Health Bullets	0.3	
1/28/12	E-mail Hazeltine re: examining committee reports Read e-mails from Kathleen.	0.3 n/c	
1/31/12	E-mail on more history of Helen's health	0.3	
2/2/12	T.C. Helen, very repetitive, does not understand conversation Refusing Aricept T.C. Tom, e-mailed Dr.Tirado script refusal	0.2  0.2	
2/3/12	T.C. Tom, Money for Danny, still frozen, Helen is still complaining	0.3	
2/8/12	T.C. Cliff Hark, Report on Helen, E-mails about Doctors reports	0.1 0.2	
2/13/12	T.C. Dan, are you the guardian? Helen has no money. What is her budget? Does not want Tom signing checks.	0.3	
2/16/12	E-mail C. Hark office, Dr. Boltson report	0.2	
2/17/12	T.C. Helen, she wants a bank card T.C. Tom, he cannot give her unlimited funds, she does not remember where her money is going.	0.3 0.2	
2/19/12	E-mail C. Hark, Otto report, review amended report.	0.2	
2/24/12	T.C. C. Hark, update for trial	0.2	
3/8/12	T.C. S. Hazeltine, The case will be contested by Lee.	0.2	
3/9/12	T.C. C. Hark, is she taking her meds? Confirm they are giving by applesauce.	0.2	
3/12/12	Receive copy of fiduciary accounting	0.2	
3/23/12	e-mail three new exam committee reports e-mail Dr. Marks report, T.C. Dan, he is insisting that Helen is being abused at ALF. T.C. Emeritus, Director. He explained her accident. A walker was put down on Helen's toe by another resident in the dining room. T.C. Helen, she spoke while she was walking to lunch.	0.2 0.2 0.2 0.3 0.2	
3/26/12	T.C. C. Hark, Motion to Strike Dr. Boltson's Report T.C. S. Hazeltine	n/c 0.2 0.2	
3/27/12	Travel to court house for trial.	3.0	
	<b>TOTAL HOURS 26.9</b> <b>@ \$75.00 PER HOUR</b> <b>LESS RETAINER</b> <b>BALANCE</b>	<b>\$2,017.50</b> <b>\$1,000.00</b> <b>\$1,017.50</b>	

# Savitt Guardians

Elizabeth "Betsy" Savitt

4101 Satin Leaf Ct.

Delray Beach , FL 33445

Helen O'Grady  
Newport Place  
4735 N.W. 7th Court  
Boynton Beach, FL 33426

Invoice Date: May 16, 2012  
Invoice Number: 10002  
Invoice Amount: \$4,442.39

## Matter: Plenary Guardianship

### Attorney's Fees

3/28/2012	T.C. Tom O'Grady re: Paying house bills, Daniel bills, phone. Initial guardianship meeting with Helen. Answer questions re: how will she get money, when will she go home, how the guardianship will work.	E.S.	1.00	\$75.00
3/28/2012	Telephone Call C. Hark, re: proposed letters of limited guardianship	E.S.	.50	\$37.50
3/28/2012	Review documents, revision of guardianship letter, file.	E.S.	.50	\$37.50
3/30/2012	Travel to office of Sheri Hazeltine, sign papers, conference call C. Hark. Go over all the new files. Discuss what to do with accounts, go over list of pleadings and calender events.	E.S.	1.50	\$112.50
3/30/2012	T.C. Sandy - fill in more medical reports	E.S.	.50	No Charge
3/31/2012	Send and recieve E-mails to S. Hazeltine regarding Daniel O'Grady.	E.S.	.50	\$37.50
4/1/2012	Read over reports on Helen, set up new files.	E.S.	1.00	\$75.00
4/3/2012	Meeting at C. Hark office about Helen's home, loans, cpa, bills, Morgan Stanley, Daniel living in house.	E.S.	2.00	\$150.00
4/5/2012	Travel to Wells Fargo bank to open up new guardianship account, e-mail M. Shapiro at Morgan Stanley about funds, court orders sent.	E.S.	1.00	\$75.00
4/5/2012	Meeting with Helen at Emeritus. Went over her expenses to re-do budget.	E.S.	2.00	\$150.00
4/5/2012	Filed papers from meetings, filed homestead exemption, travel to Newport, met with Tom and Sandy to discuss money and bank accounts, possible	E.S.	2.00	\$150.00

	moving from Emeretus.			
4/10/2012	E-mail and response of wrap up from C. Hark, Hazeltime. E-mail Morgan Stanley, fax letters of guardianship	E.S.	1.00	\$75.00
4/11/2012	Meeting with Tom and Sandy, accounting	E.S.	1.50	\$112.50
4/11/2012	T.C. C. Hark, S. Hazeltine, M. Shapiro, more case background.	E.S.	1.20	\$90.00
4/13/2012	Travel to office of Ira Goldfarb, tax preparer on behalf of Mrs. O'Grady. Meeting with Mr. Goldfarb in order to sign tax documents and pay his fee, consult on tax planning.	E.S.	1.50	\$112.50
4/13/2012	Meeting with Sheri L. Hazeltine, Esq. regarding petitions.	E.S.	1.50	\$112.50
4/16/2012	Travel to Michael Shapiro's office at Morgan Stanley, sign paperwork, discuss exchange funds, estate planning, capital gains changes etc. Wells Fargo Bank to order checks, apply for limited credit card for Helen.	E.S.	2.20	\$165.00
4/16/2012	Travel to CPA for signing of hard copy taxes after theft of S.S. number. Visit to Helen, speak about her house, join her in the dining room.	E.S.	2.00	\$150.00
4/18/2012	T.C. consult about exchange funds. Bills sent to Cliff Hark, review billing from attorney's. T.C. Bethesda Hospital	E.S.	1.50	\$112.50
4/18/2012	Travel to Bethesda to sign release forms	E.S.	.60	\$45.00
4/21/2012	T.C. Tom scheduled meeting with Helen, Emeritus problems	E.S.	.30	\$22.50
4/22/2012	T.C. Helen, Foot problems, has many questions for the meeting on Thursday, E-mail Hazeltine, Tom's final accounting due, our accounting will be late. T.C. Tom, dividends came from Chase, re: Altria. Locate the Kraft check. Information from Rubenstein, and Nutovits, medical information, Dr. reports, family problems, send Ron all the reports. T.C. Ada movers.	E.S.	1.50	\$112.50
4/24/2012	T.C. Morgan Stanley, review bank account, transfers set up, check PNC bills paid, taxes paid, Newport reservation. Check Wells Fargo deposits from Morgan Stanley.	E.S.	1.50	\$112.50
4/25/2012	T.C. Tom, Helen missed her wound care appointment. T.C. Sandy, T.C. Bethesda Hospital, T.C. Emeritus, sent the nurse to room. Called back. T.C. Helen sounds very groggy, and was in pain. Gave pain medication. T.C. Tom to take her to Emergency room for check in to get wound care, from the missed appointment. T.C. Tom as they were admitted, put on I.V. antibiotics. T.C. Emeritus to discuss how her appointment at wound care center for 9:30 was cancelled. T.C. Nurse station for update.	E.S.	2.30	\$172.50
4/26/2012	Review attorney bills, T.C. Hazeltine, discuss in	E.S.	1.80	\$135.00

4/26/2012	detail to designate what is for benefit of ward. Travel to Bethesda for meeting with Helen and Tom. Coherent and talkative. Discussed moving advantages and the condition of her home.	E.S.	1.00	\$75.00
4/27/2012	T.C. Tom, Dr. Nutovits, Helen is staying in Bethesda until at least Monday. As soon as possible moving to rehab unit next door for recovery. The script written in March for wound care found, never processed. Consolidate bills and automatic billing. E-mail to S. Hazeltine, re: status at hospital.	E.S.	1.00	\$75.00
4/28/2012	E-mail from Ron, Attorney, Tom and S. Hazeltine.	E.S.	.50	\$37.50
4/28/2012	T.C. Tom, coordinate a move. E-mail from Ron and Stephanie.	E.S.	.50	\$37.50
4/29/2012	E-mail, Sandy, items missing from her room. Need to buy new toilet, shower rails. Nightgowns, bedding, missing or soiled.	E.S.	.20	\$15.00
5/2/2012	E-Mails, Tom, Helen's condition. T.C. S. Hazeltine, court hearing on fees, e-mails from Att. Miller office, T.C. C. Hark, they need documents for wrap up of ETG.	E.S.	1.00	\$75.00
5/3/2012	Wrote update letter on Helen. E-mails from C. Hark, respond.	E.S.	1.30	\$97.50
5/4/2012	T.C. Tom, read over Living Will, Health Care Surrogate.	E.S.	.30	\$22.50
5/5/2012	Meeting with Tom and Sandy re: will, advance directives, Danny, ETG, bills, neice, pnc bank	E.S.	1.50	\$112.50
5/5/2012	Paid ct. ordered att. fees, appraiser, set up files, read over documents from Tom, e-mail letter to family concerning the house, go over budgets, recieve court orders from Hazeltine, file.	E.S.	3.00	\$225.00
5/7/2012	T.C. Tom, discuss what is still owed, Pay bills, E-Mail to C. Hark, Change At&t billing.	E.S.	3.00	\$225.00
5/8/2012	T.C. Kraft, Altria, prepare and fax documents for transfer to Morgan Stanley. Dividend recovery. Print out forms for transfer. Pay and send forms to Sunflower Bank, T-mobil Bills. E-mail to Ron, asking for the house imput. Read 6 family E-Mails.	E.S.	5.00	\$375.00
5/9/2012	Meet with S. Hazeltine to go over files, Travel to meeting at Attorney Huber for conference call with Ron, re-cap notes and file.	E.S.	2.50	\$187.50
5/9/2012	Mail check to Daniel with expectation for benefits to continue letter.	E.S.	.50	\$37.50
5/10/2012	Travel to Boulevard Re-Hab, met with director, signed all paperwork, met with Dr. Nutovits, spoke with Helen.	E.S.	2.00	\$150.00
5/11/2012	Travel to Wells Fargo to obtain Medallion stamp and signatures from bank officer for Kraft and Altria. Removed wire transfers.	E.S.	1.50	\$112.50
5/11/2012	T.C. S. Hazeltine, Re: petitions, will, estate, status of wrap up.	E.S.	.50	\$37.50
5/11/2012	T.C. Tom, history of POA, Living Will before	E.S.	1.00	No Charge

	hospital, POA at hospital in Miami, Robert Kleinman at Boulevard re-hab,			
5/12/2012	T.C. Tom, Helen sounds a little better today, still in and out. Spoke about Bills and Dividends.	E.S.	.40	\$30.00
5/12/2012	Post letters to Kraft, Altria, Sunflower Bank. T.C. Tom, update.	E.S.	.30	\$22.50
5/14/2012	E-mail communication to family re: Status of Helen from Dr. Nutovits.	E.S.	.50	\$37.50
5/14/2012	Read E-mails from all family members concerning history, health, home, stocks.	E.S.	1.00	No Charge
SUBTOTAL:			61.40	\$4,417.50

**Costs**

5/14/2012	Mailings to Kraft, Altria, Sunflower, copies, postage			\$24.89
SUBTOTAL:				\$24.89

TOTAL: \$4,442.39  
PREVIOUS BALANCE DUE: \$0.00  
CURRENT BALANCE DUE AND OWING: \$4,442.39

	+ 2017.50
	<hr/> 6459.89
Less	1,000.00
	<hr/> 5459.89

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